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7 APPENDIX: Financial Plan

The company's financial performance, both historical and projected. Includes sales, cost of goods sold, expenses, income statement, balance sheet, cash flow budget, financial requirements, performance indicators, and personal status.



LEGAL NAME ▶

TRADING NAME ▶

BUSINESS ADDRESS ▶

PHONE ▶ FAX ▶

E-MAIL ▶

DESCRIPTION OF THE BUSINESS ▶

MAJOR DEMOGRAPHIC, ECONOMIC, SOCIAL AND CULTURAL FACTORS ▶

MAJOR PLAYERS (suppliers, distributors, clients) ▶

NATURE OF THE INDUSTRY ▶

TRENDS IN THE INDUSTRY ▶

GOVERNMENT REGULATIONS ▶



THE MARKET

MARKET
SEGMENT ▶

PRODUCTS
& SERVICES ▶

PRICING AND
DISTRIBUTION ▶

MARKET TRENDS ▶

IMPLICATIONS
OR
RISK FACTORS ▶

PLANNED
RESPONSE ▶

COMPETITION

COMPETITORS
AND TYPE OF
COMPETITION ▶

COMPETITORS'
STRENGTHS AND
WEAKNESSES ▶

COMPETITIVE
ADVANTAGE ▶



CUSTOMERS ▶	NAME/ADDRESS	TERMS	PRODUCT/SERVICE
	1		
	2		
	3		
	4		
	▼ ADDITIONAL INFORMATION		
	<div style="border: 1px solid black; height: 40px;"></div>		

SUPPLIERS ▶	NAME/ADDRESS	TERMS	PRODUCT/SERVICE
	1		
	2		
	3		
	4		
	5		
	▼ ADDITIONAL INFORMATION		
	<div style="border: 1px solid black; height: 40px;"></div>		

ADVERTISING & PROMOTION ▶

PRICING & DISTRIBUTION ▶

CUSTOMER SERVICE POLICY ▶



LOCATION ▶

▼ SIZE AND CAPACITY

▼ ADVANTAGES OR DISADVANTAGES

▼ LEASE OR OWNERSHIP DETAILS

EQUIPMENT,
FURNITURE &
FIXTURES ▶

FUTURE
EXPENDITURES /
TECHNOLOGY
REQUIREMENTS ▶

RESEARCH AND
DEVELOPMENT ▶

ENVIRONMENTAL
COMPLIANCE ▶

ADDITIONAL
INFORMATION ▶



KEY EMPLOYEES	NAME OR TITLE (Nº OF POSITIONS)	KEY RESPONSIBILITIES	QUALIFICATIONS
	1		
	2		
	3		
	4		
	▼ ADDITIONAL INFORMATION		
	<div style="border: 1px solid black; height: 40px;"></div>		

POLICIES & PROCEDURES

HOURS OF OPERATIONS	<div style="border: 1px solid black; height: 25px;"></div>
NUMBER OF EMPLOYEES	<div style="border: 1px solid black; height: 25px;"></div>
VACATION PROGRAM	<div style="border: 1px solid black; height: 40px;"></div>
PERFORMANCE ASSESSMENT	<div style="border: 1px solid black; height: 40px;"></div>
TRAINING & DEVELOPMENT	<div style="border: 1px solid black; height: 40px;"></div>
REMUNERATION AND BENEFITS	<div style="border: 1px solid black; height: 40px;"></div>



ACTION PLAN ▾

ACTION	BY WHEN
1	
2	
3	
4	
5	
6	
7	

▾ ADDITIONAL INFORMATION



OBJECTIVES /
DESCRIPTION OF
THE PROJECT

BUSINESS
HISTORY /
NATURE OF
OPERATIONS

PRODUCTS AND
SERVICES

PROJECT
FINANCING

MANAGEMENT /
ADVISORS

Director 1

Director 2

RISK
ASSESSMENT &
CONTINGENCY
PLAN



FINANCIAL
INSTITUTION



SUPPORTING
DOCUMENTS





APPENDIX

FINANCIAL PLAN
